

Telephone etiquette

Question: Telephone screening and taking messages are a very important part of my job, but I am terrible at getting a name right when someone calls. Does anyone have any suggestions on how to politely ask (sometimes more than once) a person's name and the nature of the call? I don't want to come across as unprofessional to my "new boss." - *Cherile*

Comments

I would just say, "I'm sorry, your name again was?" for the first follow up then. Then just before you end the call, ask them to spell it so you can confirm their spelling. This way, you have heard it at least 3x and should have it by then.

Posted by: Tracy Johnson | August 17, 2007 at 12:05 PM

I hate it when I do things like that, too. The thing I do is apologize before asking for the caller's name/nature of the call again. I have a pen and some paper by my phone, so when the caller repeats what they are asking for and their name, I can write it down--even if I write it down phonetically. I can always rewrite the message before delivering it.

Posted by: Diane Johnson-Hung | August 17, 2007 at 12:06 PM

As they are talking, write down as much information as you can and as you are reading it back for accuracy say something like "And that name again?" If necessary "And how do you spell that?" Even if it is a simple name, the other person will appreciate your making sure that it is correct.

Posted by: Dona | August 17, 2007 at 12:08 PM

When you ask them the first time to take down their name, if you don't hear it well or cannot make out their response, simply ask them "Can you spell that for me, please?" Then use their name to thank them, letting them know that you have their correct name (or they can correct you if indeed you didn't get it down correctly).

Posted by: CC | August 17, 2007 at 12:09 PM

Most people do not mind if you ask them to repeat their name and spell it if you have a question. They would rather have it right. As for the nature of the call, again, "May I tell him/her the nature of the call so he/she can be prepared with any information you may need?" or something similar. If you boss is like mine, he also does

not want to be interrupted by sales calls and calls that should be routed to someone else. This also eliminates that problem since you reroute calls to the proper person.

Posted by: | August 17, 2007 at 12:11 PM

Most importantly you must be a good listener, this can not be over emphasized, when you are taking messages. Don't try to multi-task b/c your attention will not be there and you will not remember what is being said.

Are you new on the job, with the company or department? If so you can tell the caller you are new at this position and you are making a database of your manager/boss' clients, friends/etc. Ask if they will please bear with you as you get to know them. Ask for the spelling of their name, repeat it to them, also repeat their phone number after they give it to you. I make a practice today to repeat phone numbers and I've been with the company 10 + years.

The same would basically apply even if you have just changed managers b/c their client list will probably be different from your prior manager.

Posted by: CAROLYN | August 17, 2007 at 12:12 PM

Hi Cherile,

I take calls for three District Sales Managers. I ask the caller, "May I tell him who's calling?" or "Who's calling please" and after I receive that info I ask, "What's this regarding?". Since my DSMs are not in the office with me and I transfer the caller to their mobile phones I also ask, "May I have your number in case we get disconnected during transfer." If you don't catch the name the first time ask the caller, "What is the correct spelling of your name?"

Write everything down. Have a pen in hand when you answer your phone. I keep my daytimer right next to me and write down every call I receive and the time. This also helps if your boss doesn't want to take the call, when you come back to the caller to inform him that you need to take a message, you already have all the info you need.

Good Luck!! Kim - Sr. Admin. Assist. 15+yrs

Posted by: Kim | August 17, 2007 at 12:12 PM

It would be helpful to STOP what you're doing when the phone rings, this way you'll have full attention to the call. Have pen and paper close by and DO ask again if you don't get it the first time, the caller will appreciate you get his or her name correct.

Posted by: Sandra Pike | August 17, 2007 at 12:13 PM

I almost always have pen and paper by the phone. I will write down the name as soon as I get it. That way, I don't have to ask the name a second time.

Posted by: Pat | August 17, 2007 at 12:18 PM

...works for me.

And "Could you spell that for me?" works for getting the last name correctly.

Also when someone asks (immediately, without identifying themselves) to be put into my boss's VoiceMail I always ask, "May I ask who is calling?" and then send my boss an e-mail telling him to check his VoiceMail.

And, if the caller asks to speak with my boss WITHOUT identifying who is calling - and if it is not a voice or phone # I recognize, I tell the caller that he is on the phone & ask if he can call them back. THAT way I can be sure I don't hook him up with an unwanted caller.

Posted by: | August 17, 2007 at 12:23 PM

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Posted by: "May I tell him what it's regarding?"... | August 17, 2007 at 12:25 PM

Often times I have the same problem. People are so ready to get to the meat of the question that they speed through their name. I always just say, My apologies but I didn't get your name. That takes them out of the hotseat because you make it sound like your fault. Just be real genuine about it and they won't think twice about repeating.

Posted by: Jade Ferguson | August 17, 2007 at 12:25 PM

Whenever I take a call for someone, I always say "May I say who's calling?" If there name is hard to understand/spell, I ask them to spell it, and I always say "May I tell him/her what this is regarding?" Since I am the Director's Executive Assistant, it is very important that she be provided with as much information as possible before taking the call or returning it. Additionally, by getting the subject matter, I often find out that it is something I can research and not something the Director needs to deal with.

Posted by: Donna Ward | August 17, 2007 at 12:26 PM

I also use the, "I'm sorry, I could not hear that clearly, could you spell that for me, please?"

Posted by: Mark | August 17, 2007 at 12:39 PM

Cherile,

Greetings! My name is Marcel, and I am a retired United States Air Force Information Manager (20+ years). The following is an excerpt from a training aid we used “back in the day”; (statements 6 & 12 will help with your issue...I included the rest FYI):

“Do ... answer the phone on the first ring and in the way you would like to be called after identifying the organization.

Do ... put on your “pleasant person” hat.

Do ... introduce everyone in the room if you are on a speaker phone—callers may object to the lack of privacy.

Do ... put the radio and TV on hold until you’re off.

Do ... speak clearly, keeping your lips about 1 inch from the mouthpiece. Good posture will also improve your vocal quality.

Do ... have a pencil, a memo pad and your directories within easy reach.

Do ... adjust your speaking tempo to match the other person’s to establish instant rapport.

Do ... ask if someone else can help if the person isn’t there.

Do ... take a number and call back instead of putting them on hold if you are finding something.

Do ... give the caller the phone number before you transfer the call.

Do ... allow the person initiating the call to bring it to a close.

Do ... record your conversation in a memo for record and place it in a file.

Don’t ... transfer an angry caller. Listen carefully, never interrupt and ask questions that require more than a “yes” or “no.” Also, make notes and let the caller know since this shows you’re interested and are willing to help.

Don’t ... put the phone over your chest to put someone on hold—your voice goes over the wires loud and clear—use the “hold” button.”

Hope this helps.

Marcel Robinson

Posted by: Marcel Robinson | August 17, 2007 at 12:42 PM

I agree with what's been said before, your caller would really rather you get it right and would have no problem if you ask again to be sure. I work closely with two other admin assistants and they often say, 'I'm sorry, what did you say your name was again?' and maybe, 'How do you spell that?' if it's an uncommon name.

Posted by: Cynthia | August 17, 2007 at 12:45 PM

Frequently several lines ring at once here and it's so easy to get confused; writing info down is critical. One other technique I've used is to USE their first name right away by saying, "Just a moment, John, and I'll see if so-and-so is in his office." Saying their name outloud helps cement it in your brain...and also makes the caller feel good to hear his name!

Posted by: Geri | August 17, 2007 at 12:49 PM

I make our staff ask each person to spell their name, even if the name is Mary Jones...This helps when we have many people calling with the same name. We've never had any problems with people not wanting to spell their name for us. Most want you to have their name correct. This method seems to be better than constantly asking someone what their name is.

As for why they are calling, the other comments seem to cover that pretty well.

Posted by: Crystal | August 17, 2007 at 01:11 PM

When they introduce themselves and you didn't catch it, ask them again, and before they go on with the message, ask for their name again, name of the company and the phone number then you can get the message. Feel free to repeat the message to ensure it's what they said. This shows the caller that you are thorough vs. feeling you're incompetent.

Posted by: Carmen | August 17, 2007 at 01:28 PM

All good points. I would add: Use last names until you're asked to do otherwise. Lots of callers are professional people who work on the same management level (or higher) as your boss. Until your boss has introduced the two of you (and you should encourage your boss to do so whenever she has visitors), you and the caller are strangers, and I personally do not like strangers (retail clerks, cashiers, customer service phone reps) to take it for granted that we are on a first-name basis. I imagine an Executive Vice President doesn't care for it, either. They probably wouldn't say anything (not PC), but you score extra points when you start out more formally. Everyone almost invariably says, "Please, call me Barbara." But it makes them feel good, I think. I know there are always exceptions, and you can feel your way with each situation, but it's a good rule of thumb.

Posted by: Anita C. | August 17, 2007 at 05:51 PM

Annoying solicitation calls have not been addressed. I'm sure you get your share of them.

If someone calls and can't pronounce my boss' name, it is usually an early clue. Or, if they ask to speak to a decision maker if I say my boss is busy - a dead ringer. Ask if your boss is expecting their call or what company they represent and the nature of their call. If you are suspicious of a solicitation, ask if they can send some information for review and get a number where they can be reached for follow-up. I usually have a hang-up by now if my suspicion is right. Sometimes they are legitimate in which case you will get a fax or USPS package.

If you get the same call over and over again (as we do from the phone company soliciting their new products), ask to talk to a supervisor. Explain to the supervisor the frequency and nature of the calls and see if you can flag your account to stop them.

For callers asking you to confirm your company's address and other information, ask for their request in writing.

This can sometimes lead to receiving expensive directories (costing several hundred dollars) and they will have a recording of you "confirming the order"! If they have a legitimate reason to confirm, they will send it in writing.

Posted by: Anonymous | August 20, 2007 at 11:38 AM

From experience, I keep a notepad next to my phone so that I can write down the name of the person calling and if I am not sure if I heard the name correctly (Bill or Will) I ask to either have them repeat the name or spell it for me. Usually callers are okay with repeating their name if they know you are sincere and passing it on correctly. If you are taking a message I usually let them know I will be repeating the information they gave me to make sure it is correct. They usually appreciate that.

Posted by: Rebecca | August 23, 2007 at 04:34 PM